

PEDS Data Entry Training Client Report

Statewide Data Collection
and Evaluation of First 5
California Funded
Programs



Goals of Training

- To describe the content and uses of the client report.
- To learn how to run the client report in PEDS.
- To learn how to use the client report filters.
- To learn how to print, save, and export the client report.

Client Report

Examples of uses

- Provide case managers with a client's history.
- Display a client's intake/follow-up schedule.
- Display a client's intake/follow-up history.
- Display services received by a client.

How do I access the Client Report?

FIRST5 CALIFORNIA
Statewide Data Collection and Evaluation

Main Menu

Proposition 10
Evaluation Data System

[Data Entry](#) [Reports](#) [Data Collection](#) [Narratives](#) [Program Setup](#) [User Type Selection](#)

Please select a Reporting Period: 2005-2006 Fiscal Year

Activities (Aggregate Data)
View Data Within Date Range (mm/dd/yyyy):
Start Date: 06/22/2006 End Date: 07/06/2006
Enter/View Data for Strategy:
Direct Service Provider Capacity Building
Nonduplicated Counts Infrastructure Investments
Community Strengthening Systems Change Activities

Achievement Milestones
Enter/View Data

Funds Spent
By Strategy

(Individual Data)
Add a New Core Participant:
Core Prenatal Parent Core Child 0-5 and Guardian
Add a New Non-Core Participant (INC):
Non-Core Guardian Non-Core Child 0-5
Search For Participant:
Last Name: Gender: Type: Status: Active Search
Group Service Details
View Data Within Date Range (mm/dd/yyyy):
Start Date: 06/22/2006 End Date: 07/06/2006
Enter/View Data Design Groups

User: sanders.mary (0 login attempts)
User Type: Funded Program User
Funded Program: Mayberry Resource

Click Search.

Done Trusted sites

How do I access the Client Report?

FIRST 5 CALIFORNIA
Statewide Data Collection and Evaluation

HELP **Client Report**

Participant Info:

- Consent/AB-99
- Demographics
- Address
- Case Notes

Intakes / Follow-ups:
03/15/2004
Edit

Services:
Service Info
Service Details

Add New Participant:
Add New

Last Name	First Name	DOB	Gen.	Part.	Type	Status	ID
Johnson	Mary	05/18/1971	F	Guardian	Core	Active	2275
Johnson	Patrick	07/18/2002	M	Child	Core	Active	2278
Jones	Richard	07/18/2003	M	Child	Core	Active	2276

1. Select participant from the participant browser.

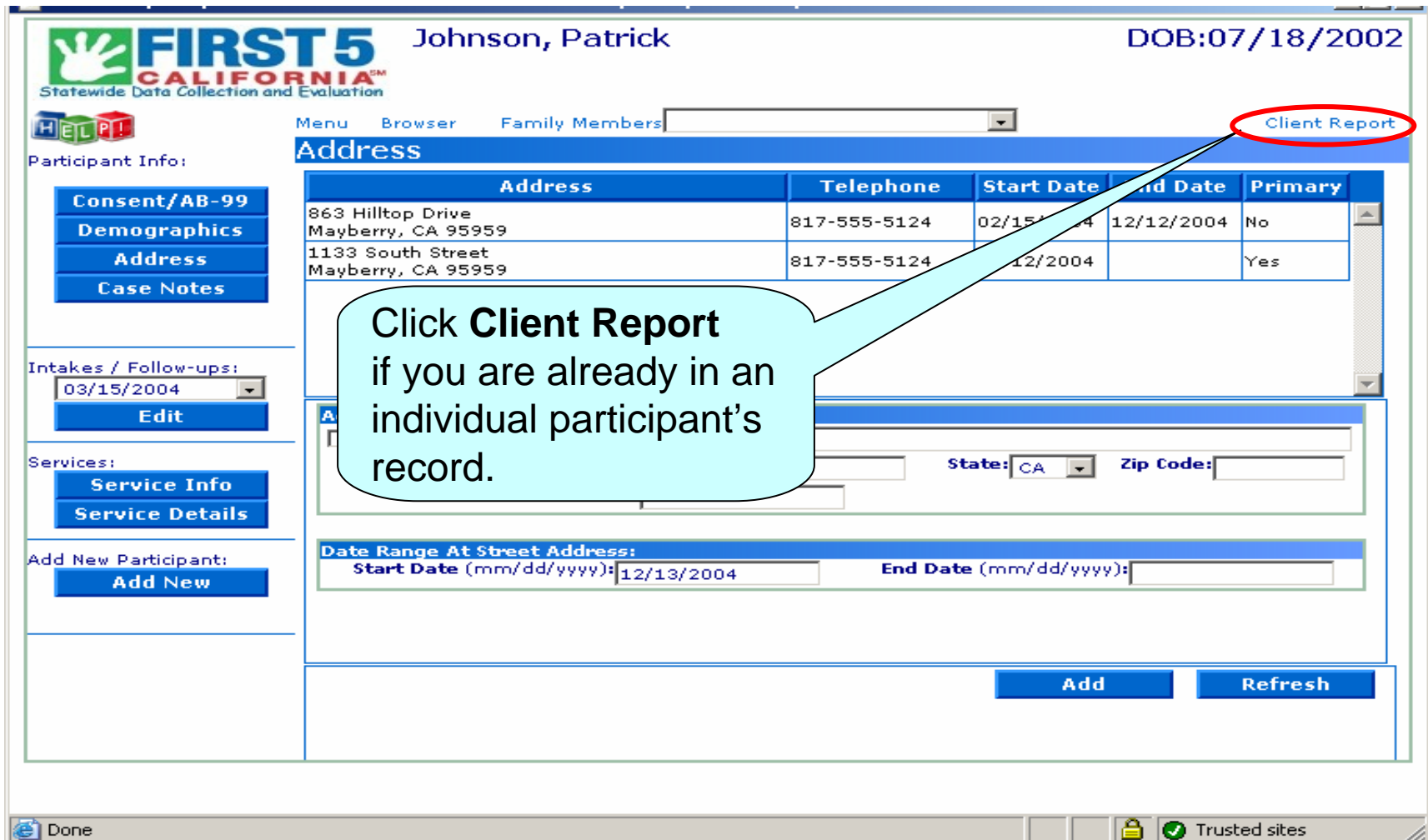
2. Click **Client Report**.

Case Information
Current Telephone 817-555-5124
Next Follow-up Due 08/03/2006
Middle Name
Mother's First Name Mary
Place of Birth Glenn

Family Information
Select family member.
Johnson, Mary (Guardian)
Jones, Richard (Child)
Add family member to selected participant.
Select
Add
Menu

Done Trusted sites

How do I access the Client Report?



FIRST5 CALIFORNIA Statewide Data Collection and Evaluation

Johnson, Patrick DOB:07/18/2002

Menu Browser Family Members

Client Report

Participant Info:

- Consent/AB-99
- Demographics
- Address
- Case Notes

Intakes / Follow-ups:

03/15/2004

Services:

- Service Info
- Service Details

Add New Participant:

Address	Telephone	Start Date	End Date	Primary
863 Hilltop Drive Mayberry, CA 95959	817-555-5124	02/15/2004	12/12/2004	No
1133 South Street Mayberry, CA 95959	817-555-5124	12/2004		Yes

State: CA Zip Code:

Date Range At Street Address:

Start Date (mm/dd/yyyy): 12/13/2004 End Date (mm/dd/yyyy):

Done Trusted sites

Client Report Report filters

Deselect any check box to exclude unwanted data from the client report.

The screenshot shows a web browser window with the title "FIRST 5 CALIFORNIA Statewide Data Collection and Evaluation". The main heading is "Individual Client Report". Below this, there are several sections of report filters, each with a list of items and a checked checkbox:

- General Information:**
 - ☒ Demographics
 - ☒ Case Notes
 - ☒ Primary Address
 - ☒ Address History
- Interviews:**
 - ☒ Intake
 - ☒ Occurrence Schedule
 - ☒ Follow-ups
- Services:**
 - ☒ Direct Services by Date
 - ☒ Direct Services Summary Table
- SNP/PoP:**
 - ☒ Developmental Screenings
 - ☒ Assessments
 - ☒ Health Surveys
 - ☒ External Services

At the bottom of the filter list, there are two buttons: "Select All" and "Unselect All". These buttons are circled in red. Below the "Select All" button, there are three blue circles of increasing size, leading to a large blue cloud-shaped callout box. At the bottom right of the window, there are two buttons: "Run Report" and "Close". A callout box points to the "Run Report" button.

The **Select All** button selects all the options.
The **Unselect All** button deselects all options.

Click **Run Report**.

Client Report

Client report sections

File Edit View Favorites Tools Help CS&O

7/7/2006

Individual Client Report

Name and Demographics

Last Name:	Johnson (Child)
First Name:	Patrick
Middle Name:	
Gender:	M
Mother's First Name:	Mary
Maiden Name:	N/A
Place of Birth:	Glenn
DOB:	7/18/2002
Ethnicity:	Black / African American
Primary Language:	English and another language equally (indicate other language)
Other Primary Language:	Some other language (Kru)
Guardians:	Mary Johnson

Address Info

Primary Address

Street:	1133 South Street
City:	Mayberry
State:	California
Zip:	95959
Telephone:	817-555-5124
Start Date:	12/12/2004
End Date:	

Street: 863 Hilltop Drive
City: Mayberry
State: California
Zip: 95959
Telephone: 817-555-5124

Done Trusted sites

Name and demographic information.

Address information.

Client Report

Client report sections

Consent start and end date.

Occurrence	Target Date	Start Date	End Date	Interview Date
Intake	03/15/2004	02/15/2004	04/26/2004	03/15/2004
6 month	09/14/2004	08/03/2004	10/28/2004	09/14/2004
1 Year	03/15/2005	02/01/2005	04/26/2005	
1 Year 6 Months	09/14/2005	08/03/2005	10/26/2005	09/14/2005
2 Year	03/15/2006	02/01/2006	04/26/2006	04/15/2006
2 Year 6 Months	09/14/2006	08/03/2006	10/28/2006	
3 Year	03/16/2007	02/02/2007	04/27/2007	

Intake Info

Date of Interview 3/15/2004

How much did your child weigh when he/she was born?
 (Pounds: 3 lbs. 4 oz. and below)
 (Kilograms: Under 1.5)
 (Grams: Under 1500)
 (Pounds: 3 lbs. 5 oz. - 5 lbs. 7oz.)
 (Kilograms: 1.5 - 2.4)
 (Grams: 1500 - 2499)
Pounds: 5 lbs. 8 oz. - 7 lbs. 15 oz.
Kilograms: 2.5 - 3.5
Grams: 2500 - 3599
 (Pounds: 8 lbs. or more)
 (Kilograms: 3.6 or more)
 (Grams: 3600 or more)
 (Don't know / Declined)

How many months pregnant were you (the child's mother) when you first received prenatal care (saw a doctor) for this pregnancy?

Dates of completed intake and follow-ups, interviews missed (in red), and interviews due.

Intake information with answers in **bold**.

Client Report Sections

File Edit View Favorites Tools Help

6 month

Date of interview 9/14/2004

Does your child have any kind of health insurance now, such as insurance through an HMO, a private insurance company, Medi-Cal, Healthy Families, or something else?

Yes
(No)
(Don't know / Declined)

Is there a place, other than an emergency room, where your child usually goes when he/she is sick or you need advice about his/her health?

Yes
(No)
(Don't know / Declined)

Is there a doctor or other health care provider that you usually take your child to for medical care?

Yes
(No)
(Don't know / Declined)

How many times in the last year did your child receive a well-child checkup, that is, a general checkup when he/she was not sick or injured?

(0 visits)
(1 visit)
(2 visits)
(3 visits)
(4 visits)
(5 visits)
6 or more visits
(Don't know / Declined)

Follow-up information with answers in **bold**.

Done Trusted sites

Client Report Sections

The screenshot shows a web browser window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a status bar (Done, Trusted sites). The main content area displays a client report for a user named "(Don't know / Declined)".

Case Notes

3/15/2004
Patrick has a speech impediment.

4/15/2006
Patrick appears to have a learning disorder.

Direct Services by Date

4/1/2006 - 6/30/2006 - (Occurrences - 15; Duration - 60 minutes)
*Child Development Services - Early education programs for children alone or together with parents
*Child Development Services - Family literacy programs

1/1/2006 - 3/31/2006 - (Occurrences - 15; Duration - 60 minutes)
*Child Development Services - Early education programs for children alone or together with parents
*Child Development Services - Family literacy programs

10/1/2005 - 12/31/2005 - (Occurrences - 15; Duration - 60 minutes)
*Child Development Services - Early education programs for children alone or together with parents
*Child Development Services - Family literacy programs

7/1/2005 - 9/30/2005 - (Occurrences - 15; Duration - 60 minutes)
*Child Development Services - Developmental screenings/assessments
*Child Development Services - Early education programs for children alone or together with parents

Two callouts are present:

- A callout pointing to the "Case Notes" section with the text "Case notes."
- A callout pointing to the "Direct Services by Date" section with the text "Direct services by dates of occurrence."

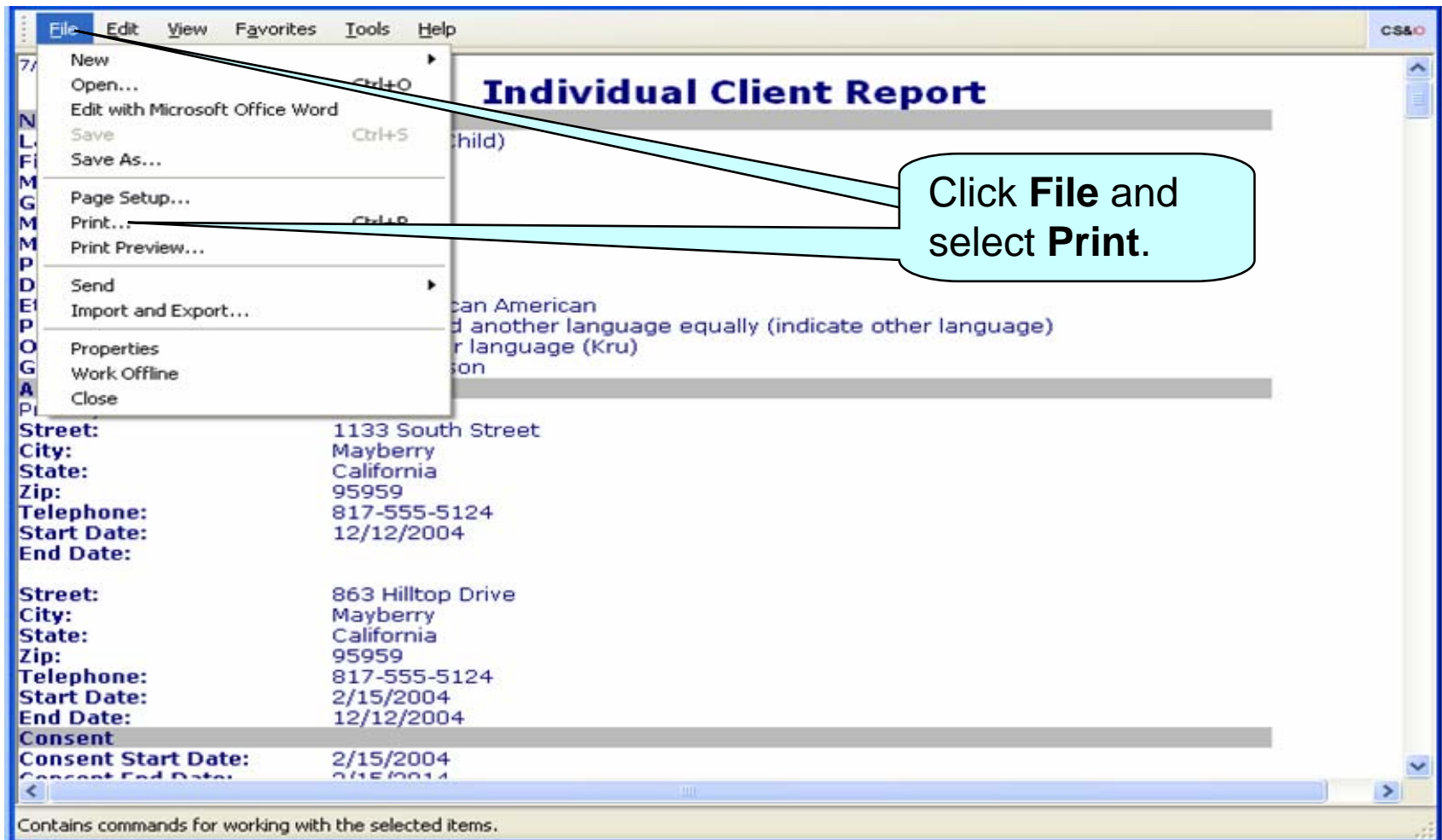
Client Report Sections

Direct services summary table.

Direct Services Summary Table										
Direct Service Activities				Service Units Provided						
	Case management	Home visit	Mobile service	In-person consultation/service	Support group session	Class/workshop	Public/community event	Phone consultation	Mailing/distribution of materials	Total
Child Development Services										
Developmental screenings/assessments	0	15	0	0	0	0	0	0	0	15
Early education programs for children alone or together with parents	0	60	0	0	0	0	0	0	0	60
Family literacy programs	0	60	0	0	0	0	0	0	0	60
Export to Word										

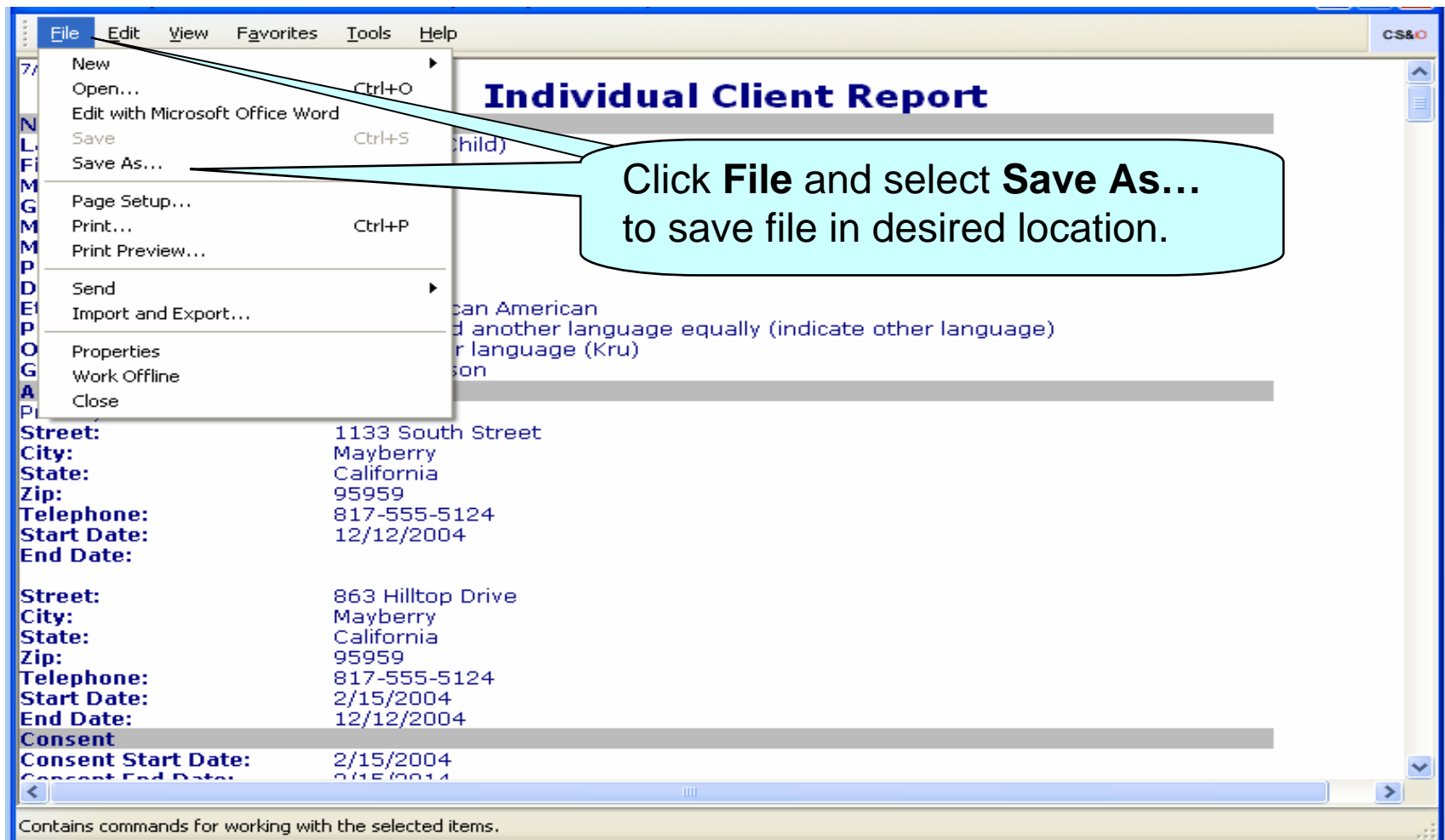
Client Report

Printing a report



Client Report

Saving a report as a file



Client Report

Exporting a report to Microsoft Word

File Edit View Favorites Tools Help CS&O

screenings/assessments
*Child Development Services - Early education
programs for children alone or together with parents
*Child Development Services - Family literacy programs

Direct Services Summary Table

Direct Service Activities	Service Units Provided								Tot
	Case management	Home visit	Mobile service	In-person consultation/service	Support group session	Class/workshop	Public/community event	Phone consultation	
Child Development Services									
Developmental screenings/assessments	0	15	0	0	0	0	0	0	
Early education programs for children alone or together with parents	0	60	0	0	0	0	0	0	
Family literacy programs	0	60	0	0	0	0	0	0	

Export to Word

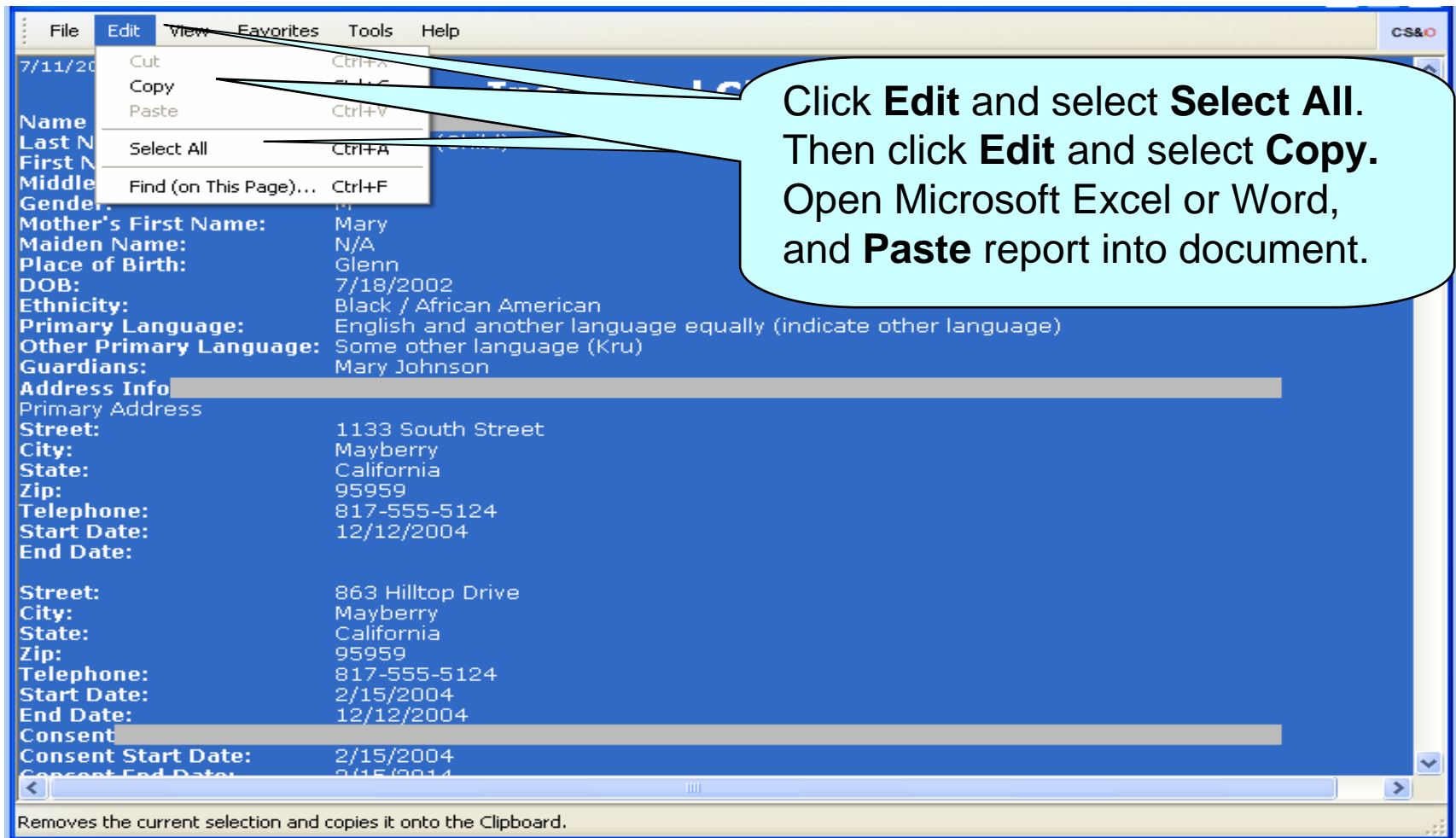
Done

Click **Export to Word** at the end of the report.

Microsoft Word must be available on your computer.

Client Report

Copying a report (in lieu of exporting)



Click **Edit** and select **Select All**. Then click **Edit** and select **Copy**. Open Microsoft Excel or Word, and **Paste** report into document.

7/11/2004

Name
Last Name
First Name
Middle Name
Gender
Mother's First Name: Mary
Maiden Name: N/A
Place of Birth: Glenn
DOB: 7/18/2002
Ethnicity: Black / African American
Primary Language: English and another language equally (indicate other language)
Other Primary Language: Some other language (Kru)
Guardians: Mary Johnson

Address Info

Primary Address

Street: 1133 South Street
City: Mayberry
State: California
Zip: 95959
Telephone: 817-555-5124
Start Date: 12/12/2004
End Date:

Street: 863 Hilltop Drive
City: Mayberry
State: California
Zip: 95959
Telephone: 817-555-5124
Start Date: 2/15/2004
End Date: 12/12/2004

Consent

Consent Start Date: 2/15/2004
Consent End Date: 2/15/2004

Removes the current selection and copies it onto the Clipboard.

Client Report Summary

To Run a Client Report

- On Main Menu, click **Search**.
- Select participant from browser.
- Click **Client Report**.
- Select desired report filters by using the check boxes.
- Click **Run Report**.

To Print a Client Report

- Click **File**.
- Select **Print**.

To Save a Client Report

- Click **File**.
- Select **Save As...**

To Export a Client Report to Word

- Click **Export to Word** at end of report.

To Copy a Client Report

- Click **Edit**.
- Select **Select All**.
- Click **Edit**.
- Select **Copy**.
- Open Microsoft Excel or Word.
- **Paste** report into document.